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# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE  
WASHINGTON, D. C.

FFVS 2-56

U. S. DEPARTMENT OF AGRICULTURE

July 2, 1956

## DENMARK: SEED EXPORT AVAILABILITIES 1956-57

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SUMMARY.- The most outstanding feature in the current Danish seed situation is the apparent confusion on the part of the Danish seed companies as to the prospective supply and demand situation during 1956-57. Substantial areas under legumes as well as grass seeds, planted for harvest in 1956, have been ploughed under during the 1955-56 season due to various types of damage to the plants but also due to the slump in prices during the fall of 1955. Furthermore, the remaining fields in many areas have a rather thin and spotted stand of plants. Nevertheless, provided good weather prevails during the remaining part of the growing season, it should still be possible to have a yield around normal for most grass and legume seed crops.

In spite of this, it is expected that the output of seed in 1956 will be significantly below the level in 1955. Carryovers of most grass and legume seeds by the end of the 1955-56 season, except for red clover and ryegrass, will also be fairly limited. The over-all export availabilities of Danish grass and legume seeds during the 1956-57 season, therefore, will be less than during the preceding season.

In spite of the uncertainties which are attached to the final outcome of the Danish seed crop in 1956, the main uncertainty in the minds of the Danish seed companies is mostly found in regard to the possible demand. The Danish seed merchants obviously expect that the enactment of the U.S. Soil Bank will mean a great stimulus to the world market demand for grass and legume seed. Nevertheless, the apparent characteristics of the Danish seed market at the present time are that the Danish seed companies are very reluctant both to sell and to buy.

#### CARRY-OVERS, APRIL 30, 1956

Carry-overs of Red Clover Rather Substantial, White Clover Negligible.- At the beginning of the 1955-56 season, the inventories of legume seed were practically depleted because most crops in 1954 were almost completely spoiled by most unfortunate weather conditions, which resulted in an average yield of only 10-15% of normal. In complete contrast, the output of legume seed in 1955 was excellent. Red clover seed, early as well as semi-late and late, however, was not sold for export during the 1955-56 season. The stocks on April 30, 1956, therefore, as estimated by the Office of the Agricultural Attache, were rather sizeable, whereas holdings of white clover were negligible due to sizeable export shipments. The stocks of alfalfa seed and black medic trefoil were zero.

The inventories of seeds, as cited above, are computed on basis of total supply and an estimated domestic consumption.

Stocks of Grass Seeds, Except Rye Grasses, Fairly Limited.- On April 30, 1956, the stocks of all types of grass seeds were larger than at the beginning of the season. Nevertheless, only the holdings of late perennial ryegrass and Italian ryegrass were sizeable enough to have a bearing on Denmark's ability to export during the 1956-57 season. The inventories of



meadow fescue, on the other hand, might also be mentioned as they totalled 1,750-2,200 thousand pounds, or 12-15 percent of the total supplies in 1955-56. All other grass seeds were available only in minor quantities. However, because of the special interest attached to Kentucky bluegrass as a result of the recently reported price increases for this grass in the United States, it may be pointed out that the Danish holdings of this grass may be in the neighborhood of 800-840 thousand pounds, or roughly three times as much as the annual Danish consumption.

A detailed review of the supply and disappearance of the various grass and legume seeds during 1955-56 is given in Table 1.

### PRODUCTION 1956

The production estimates discussed below are based on (a) the recorded areas contracted for harvest in 1956; (b) the data available on areas ploughed under by the middle of May; and (c) the average yield during the 1945-54 period (Table 2). Of course, some uncertainty is attached to the size of areas ploughed under as well as to the possible yield per acre in 1956. It is believed, however, that although the output must be viewed with certain reservations, the production figures represent rather truly the magnitude of the possible output in 1956.

(Table 2 lists the area estimated available for harvest, the yield per acre and production by crops. Table 3 gives the annual and the average yield for individual legume and grass seed crops during the period 1945-54.)

Red Clover Production 50 Percent, White Clover 30 Percent Below 1955.-  
The output of red clover seed in 1956 is at the present time estimated at roughly 4,400 thousand pounds, or only about 50 percent of last year's crop. Although this is a rather drastic drop, it is even worse in the case of white clover, the output of which is estimated to amount to approximately 1,750 thousand pounds, or roughly 30 percent of the output in 1955.

In attempting to reveal the various reasons for the expected substantial drops in production, it is evident that a complexity of factors has caused this development. Initially, plantings of legume seed crops in early 1955 were made under the impression of the poor crop in 1954 and the consequent sky-rocketed prices of many seeds. Therefore, it is not surprising that the areas under legume seed, primarily red clover, were expanded. Weather conditions during the summer of 1955, moreover, favored the development of the seed crops. The Danish seed growers finally experienced legume seed crops as abundant as very seldom seen in this country, and prices declined heavily during the second half of 1955. This slump in prices, of course, made farmers speculate somewhat as to the profitability of production in 1956 and undoubtedly induced some farmers to plough up less productive areas. The hot and dry spell during the summer of 1955 also helped to diminish the areas, primarily fields under white clover and black medic trefoil. The red clover crops, however, suffered less but were in many areas

attacked by *Sclerotinia trifoliorum*. Several areas under all three types of legumes were ploughed under during the fall due to the developments outlined above. The chilly and wet fall, the severe winter, the highly alternating temperatures during March and April 1956 added to the areas that had to be ploughed under because the stand had been thinned out too heavily.

By the middle of May, it was estimated that 20-25 percent of the originally planted areas of red clover had been ploughed under and, in the case of white clover, 30-35 percent. Information available on areas of other legume seeds which have been ploughed under vary a great deal. The area under black medic trefoil, however, has undoubtedly been reduced within the range of 20-50 percent.

In addition to the fact that substantial areas under legume seeds have been ploughed under, many of the remaining fields have a rather thin stand of plants. If weather conditions and other factors influencing the seed yield develop satisfactorily, however, it is the opinion of the Danish seed experts that it is still possible to obtain a normal yield this year. The weed content, because of the open spaces in the fields, is assumed to be rather large in the 1956 crop.

Grass Seed Production One-Third Below 1955.- The over-all output of grass seeds in 1956 may total roughly 44,000 thousand pounds, or about one-third less than in 1955. This anticipated drop is primarily due to a reduction in the planted areas. Such a reduction was initiated during the fall of 1955, when prices were sliding downwards and many old fields consequently were ploughed under. In addition, the drought during the summer of 1955 destroyed many fields planted during the spring, and a larger area of these fields was ploughed up than normal. The winter kill in 1955-56 also diminished the areas under certain grass seed crops, primarily common (Italian) ryegrass.

At the present time, it is somewhat difficult to get a true picture of the size of the reduced areas under grass seeds. However, by the middle of May it was assumed that 20-40 percent of the areas planted under common (Italian) ryegrass was ploughed under; 15-50 percent of the areas under bluegrass, in some areas mostly Kentucky and in others mainly roughstalk bluegrass. The areas of orchard grass, meadow fescue, red fescue and perennial ryegrass which have been ploughed under vary, according to available information, from zero to 10 percent of the planted area. It seems, however, to be the general opinion that a greater fraction of the area under meadow fescue has been ploughed under and that the same is true of red fescue in certain areas.

The stand of plants in many of the remaining grass seed fields is rather thin even though substantial areas under poor grass seed crops have been ploughed up. Provided favorable weather conditions during the remainder of the growing season and during harvest prevail, it may be possible to have a yield around normal.



### EXPORT AVAILABILITIES 1956-57

The quantities of legume and grass seeds available for export during 1956-57 have been estimated by the Office of the Agricultural Attache based on estimated carry-overs, estimated production in 1956 and a normal domestic consumption during 1956-57 (Table 4).

Supplies of Red Clover Available for Export Probably Limited in 1956-57; No White Clover Available.- The supplies of semi-late and late red clover available for export during 1956-57 and end-of-season (1956-57) carry-overs total 3,150 thousand pounds. Assuming that Danish seed companies will keep certain carry-overs in reserve at the end of the 1956-57 season to await developments in the crop to be harvested in 1957, it seems reasonable to anticipate that 2,200 thousand pounds of semi-late and late red clover will be offered to export in 1956-57.

White clover seed, however, may only be available in sufficient quantities for carry-over purposes. This is confirmed by several seed companies and a heavy upward trend in the price of white clover seed recently. Imports of black medic trefoil on a minor scale may be required in 1956-57. Alfalfa seed will have to be imported as usual; an import of 900-1,100 thousand pounds at the most is likely.

Export Availabilities of Grass Seed 1956-57 Smaller Than During Preceding Season.- Export availabilities of grass seeds during the 1956-57 season appear at this time somewhat smaller than during the 1955-56 season. Primarily the supplies of orchard grass and roughstalk bluegrass available for export may be smaller than during 1955-56. Meadow and red fescue will also be available in smaller quantities. The availabilities of the rye grasses seem to be fairly abundant although slightly smaller than in 1955-56.

### AREAS FOR HARVEST 1957

Contracted Areas Under White Clover, Perennial Ryegrass, Orchard Grass, Roughstalk Bluegrass and Kentucky Bluegrass for Harvest in 1957 Expanded.- The Committee of the Ministry of Agriculture on imports and exports of seeds has recently published data on the seed areas contracted for harvest in 1957 (Table 5). Compared to similar data for 1956, the contracted area under white clover was expanded by 32 percent, whereas the areas under red clover were reduced by 10-16 percent, depending on the variety. The area under black medic trefoil was practically unchanged.

Among the grass seeds, the contracted area under orchard grass was expanded by five percent, roughstalk bluegrass by eight percent, and Kentucky bluegrass 46 percent. The area under early perennial ryegrass was raised four percent. The above expansions seem to fall well in line with the present supply and demand situation. A reduction of 12 percent in the area under red fescue and 20 percent in the case of meadow fescue seems, however, to be rather drastic as the estimated export availabilities in 1956-57 are somewhat smaller than the actual export in 1955-56. It may well be, however,

that these estimates as to production in 1956-57 are a little over-cautious.

### PRICES

Prices of Grass and Legume Seeds Moved Upward During January Through April 1956.- The prospects for a smaller crop in 1956 as compared to the preceding year have resulted in an upward trend in prices of seeds during the first four months of 1956 (Table 6). On the other hand, it should not be overlooked that seed prices, during the second half of 1955, declined rather drastically due to the excellent crop in 1955. The increased prices during the first part of 1956 may, therefore, also in part be a psychological reaction to the said price drop.

### MARKET OUTLOOK

Uncertainty in Danish Commercial Seed Quarters as to Supply and Demand 1956-57.- The current tone of the Danish seed market seems to be rather firm. In discussing the prospective supply and demand situation and the possible consequent price developments on the world market, Danish seed merchants seem to be somewhat confused as to the future. Apparently they have taken the stand to wait and see.

Danish Seed Merchants Greatly Interested in Possible Effects of Soil Bank Plan on United States Seed Demand.- Danish seed companies have expressed great interest in the possible effects the Soil Bank may have on the demand for grass and clover seed in the United States. Danish seed merchants at this time are obviously somewhat reluctant to sell at the moment, expecting an increasing demand from the United States and thereby being able to sell at higher prices in the future. Recently, Danish seed companies have pointed to the increasing prices of Kentucky bluegrass in the United States, taking them as an indication of an increased demand because of the introduction of the Soil Bank.

British May be Particularly Interested in Buying Danish Orchard Grass During 1956-57.- According to available information, the British orchard grass seed crop in 1956 is estimated at only one-half of normal. Bearing in mind that the Danish crop in 1956 is estimated at only two-thirds of last year's crop, this could lead to a situation of increased demand for Danish orchard grass seed from the United Kingdom and consequently reduce the Danish supplies available for export to the United States.



TABLE 1. GRASS AND LEGUME SEEDS: Supply and Distribution, July 1, 1955 - April 30, 1956

Kind of Seed	Stocks on July 1, 1955	Production 1955	Imports July 1, 1955 - Apr. 30, 1956	Total Supply July 1, 1955 - Apr. 30, 1956	Exports July 1, 1955 - Apr. 30, 1956	Estimated Domestic Consumption 1955-56 Season	Estimated Carry-over on April 30, 1956
				1,000 pounds			
Red Clover, early	234	1,429	55	1,717	53	992-1100	562- 672
Red Clover, semi-late and late	661	7,504	-	8,166	112	4409-4850	3203-3644
White Clover	348	5,922	11	6,281	3,437	1764-2205	639-1080
Alsike Clover	49	395	7	450	2	220	227
Alfalfa	234	35	747	1,016	-	1016	0
Black Medic Trefoil	13	2,066	11	2,090	728	1322	40
Kidneyvetch	-	11	4	15	-	15	0
Birdsfoot Trefoil	60	62	-	121	-	121	0
Perennial Ryegrass, early	362	10,794	-	11,155	9,178	1323-1764	214- 655
Perennial Ryegrass, late	1,107	7,489	2	8,598	3,713	2646-3307	1578-2240
Common (Italian) Ryegrass	884	9,052	112	10,049	6,407	882-1323	2319-2760
Timothy	323	1,506	66	1,894	179	1323-1543	172- 392
Orchard Grass	483	14,530	44	15,057	12,928	882-1102	807-1027
Meadow Fescue	1,290	12,372	-	13,662	9,228	2205-2646	1788-2229
Red Fescue	337	4,941	2	5,280	4,455	220- 331	494- 604
Hard Fescue	26	139	-	165	106	22	38
Roughstalk Bluegrass	366	4,784	-	5,150	4,813	132- 176	161- 205
Kentucky Bluegrass	99	2,352	84	2,535	1,519	176- 220	796- 840

Source: The Committee of the Ministry of Agriculture on imports and exports of seed; the Statistical Department; and the Office of the Agricultural Attache.

TABLE 2. GRASS AND LEGUME SEEDS: Production Estimate, Denmark, 1956

Kind of Seed	Estimated Area	Average Yield	Estimated
	for Seed Production 1956 <sup>1/</sup>	Per Acre 1945-54	Production 1956
	Acres	Pounds	1,000 pounds
Red Clover, early	3,954	171	675
Red Clover, semi-late and late	17,297	224	3,873
White Clover	9,884	185	1,825
Alsike Clover	741	166	123
Alfalfa	-	171	-
Black Medic Trefoil	1,977	680	1,345
Kidney Vetch	-	-	-
Birdsfoot Trefoil	-	-	-
Perennial Ryegrass, early	9,884	997	9,859
Perennial Ryegrass, late	7,413	790	5,853
Common (Italian) Ryegrass	4,942	807	3,986
Timothy	3,212	353	1,133
Orchard Grass	17,297	493	8,534
Meadow Fescue	12,849	592	7,601
Red Fescue	6,178	517	3,192
Hard Fescue	494	-	-
Roughstalk Bluegrass	2,965	503	1,490
Kentucky Bluegrass	2,965	290	860

<sup>1/</sup> This estimate is based on areas contracted for seed production in 1956, information available on areas under free-lance production as well as estimates on areas ploughed under due to winter and other damage.

Source: Office of the Agricultural Attache.

TABLE 3. GRASS AND LEGUME SEEDS: Annual and Average Yield, Denmark, 1945-54

Kind of Seed	1945	1946	1947	1948	1949	1950	1951	1952	1953	1954	Average 1945-54
Red Clover, early	176	118	260	179	220	176	161	148	245	23	170
Red Clover, semi- late and late	208	130	273	267	275	252	248	236	319	28	224
White Clover	165	117	161	236	301	240	209	203	185	34	185
Alsike Clover	126	150	219	186	211	163	132	204	232	26	165
Alfalfa	411	127	319	302	109	112	58	120	132	12	170
Black Medic Trefoil	859	570	332	896	719	827	844	717	712	332	681
Perennial Ryegrass, early											
Perennial Ryegrass, late	748	733	447	873	894	958	1,114	1,130	854	892	997 1/2
Common (Italian) Ryegrass	816	794	125	774	976	786	1,147	965	956	723	807
Timothy	343	347	306	338	367	305	414	439	393	269	352
Orchard Grass	425	293	239	439	537	572	619	644	531	633	493
Meadow Fescue	532	476	479	560	709	592	795	621	535	615	592
Red Fescue	528	370	243	481	579	605	652	677	597	429	517
Roughstalk Bluegrass	514	456	222	355	641	432	562	705	602	532	502
Kentucky Bluegrass	178	190	158	238	302	322	481	294	483	256	290

1/ Average of 1951-54. Source: Office of the Agricultural Attache.



TABLE 4. GRASS AND LEGUME SEEDS: Supply and Disappearance, Denmark, 1956-57

Kind of Seed	Estimated Carryover July 1, 1956 1/	Estimated Production 1956 2/	Total Supply 1956-57	Estimated Domestic Consumption 1956-57 Season 3/	Available for export in 1956-57 and for carryover end of crop year
	1,000 pounds				
Red Clover, early	551	675	1,226	939	287
Red Clover, semi-late & late	3,197	3,873	7,070	3,918	3,152
White Clover	661	1,825	2,486	1,715	771
Alsike Clover	220	124	344	223	121
Alfalfa	-	-	-	1,069	-1,069
Black Medic Trefoil	-	1,315	1,315	1,649	- 304
Perennial Ryegrass, early	220	9,859	10,079	1,592	8,487
Perennial Ryegrass, late	1,543	5,853	7,396	2,930	4,466
Common (Italian) Ryegrass	2,315	3,986	6,301	780	5,521
Timothy	220	1,133	1,353	1,404	- 51
Orchard Grass	772	8,534	9,306	937	8,369
Meadow Fescue	1,764	7,601	9,365	1,986	7,379
Red Fescue	496	3,192	3,688	225	3,463
Roughstalk Bluegrass	165	1,490	1,655	139	1,516
Kentucky Bluegrass	772	860	1,632	201	1,431
	:	:	:	:	:
	:	:	:	:	:

1/ This estimate is based on computed carryovers by April 30, 1956.

2/ Method of computation, see Table 2 and footnote to that table.

3/ This estimate is simply the domestic average consumption during 1950-54 period. At this time there is no reason to expect substantial deviations from this during 1956-57 season. Source: Office of the Agricultural Attache.

TABLE 5. GRASS AND LEGUME SEEDS: Areas Contracted as of April 1, 1955 and 1956, For Harvest in 1956 and 1957, Respectively

Kind of Seed	Areas Contracted as of April 1		1956 As Percentage of 1955 Percent
	1956	1955	
	for Harvest in 1957	for Harvest in 1956	
	Acres	Acres	
Red Clover, early	4,878	5,429	90
Red Clover, semi-late and late	18,330	21,787	84
White Clover	19,736	14,915	132
Alsike Clover	843	813	104
Alfalfa	15	45	33
Black Medic Trefoil	2,807	2,933	96
Perennial Ryegrass, early	12,224	11,737	104
Perennial Ryegrass, late	6,439	8,369	77
Common (Italian) Ryegrass	6,664	6,926	96
Timothy	3,027	3,012	101
Orchard Grass	20,532	19,536	105
Meadow Fescue	11,535	14,475	80
Red Fescue	4,999	5,706	88
Roughstalk Bluegrass	5,886	5,456	108
Kentucky Bluegrass	5,167	3,551	146

Source: The Committee of the Ministry of Agriculture on Imports and Exports of Seed.

TABLE 6. GRASS AND LEGUME SEEDS: Wholesale Prices 1/, Denmark, Semi-Monthly, December 28, 1955,  
Through April 26, 1956

Kind of Seed	Dec. 28	Jan. 11	Jan. 26	Feb. 10	Feb. 24	Mar. 10	Mar. 23	Apr. 14	April 26
----- Dollars Per Hundred Pounds -----									
Orchard Grass	\$ 13.30	\$ 14.12	\$ 15.77	\$ 16.59	\$ 16.75	\$ 16.91	\$ 16.58	\$ 16.75	\$ 16.58
Meadow Fescue	8.04	8.54	8.70	9.03	11.33	11.66	11.33	11.50	11.66
Perennial Ryegrass, early	10.57	10.94	11.10	11.33	11.66	13.30	12.99	12.64	12.64
Perennial Ryegrass, late	10.84	10.94	11.16	11.33	11.66	13.14	12.81	12.48	12.31
Common (Italian) Ryegrass	8.87	8.87	8.87	9.03	11.98	11.98	11.66	11.33	11.33
Timothy	23.98	23.81	24.00	23.65	23.81	23.02	23.65	23.65	22.99
Roughstalk Bluegrass	24.63	24.63	24.64	25.29	25.79	25.95	26.28	26.28	25.62
Kentucky Bluegrass	45.99	47.63	47.46	45.94	47.80	45.98	44.83	45.98	45.98
Red Fescue	12.15	12.15	14.61	15.93	15.60	17.57	17.74	17.74	17.57
Red Clover, early	37.44	37.77	39.41	40.40	39.74	40.89	35.47	40.89	41.06
Red Clover, semi-late	33.50	34.49	34.98	34.65	34.98	35.30	35.47	38.92	38.43
White Clover	52.83	55.17	59.12	62.24	64.37	64.37	64.05	64.05	66.01
Alsike Clover	41.38	41.06	41.06	40.40	39.41	39.41	39.41	39.41	36.13
Black Medic Trefoil	16.25	16.25	16.58	16.75	16.42	16.91	17.08	16.75	15.93

1/ Mid-points of reported ranges. Source: "Dansk Frøavl" (Seed Magazine).